DirectMatch Training

For End Users

Presented by:
Elaine Rulla

Good Morning. Welcome to the Louisiana Dept of Education DirectMatch Webinar hosted by LDOE and eScholar.

My name is Elaine Rulla and I will be your host for the presentation.

From LDOE, *we have a large group of participants. We are also happy to have such a large group of participants from across Louisiana today. This is great!*

Our goal this morning is to introduce you to the DirectMatch v. 2020 system. We will be recording today's webinar in case others are interested in viewing this session. After the webinar, you will receive a copy of today's presentation along with my commentary. In addition, once the questions have been answered, you will receive a written copy of the Q&A.

I see we are about ready to get started. Just a few logistics before we begin: You are currently muted. If you wish to ask a question, please type it in the Q&A box. Take a moment and locate the Q&A box on your device. Since we have such a large group attending today, we likely will answer most questions in a follow-up email post webinar.

Also, during the webinar, I will periodically ask you to respond to Poll questions. Your answers are anonymous. You will be able to answer the questions by clicking directly on your computer screen or your device.
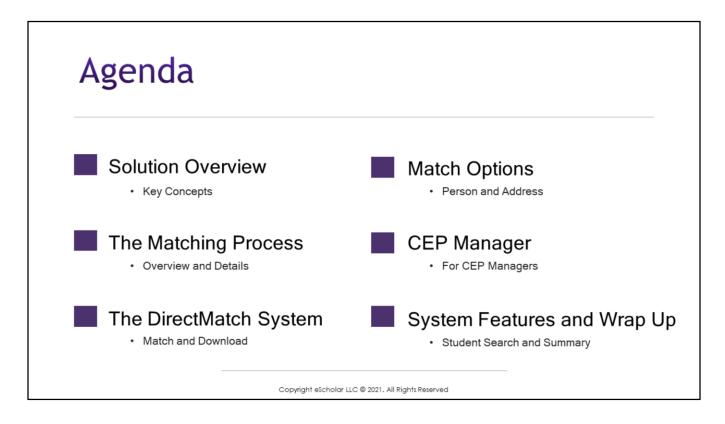
Ok. Let's get started. (To slide deck....)

The DirectMatch training is a Louisiana Department of Education initiative designed to orient users to the DirectMatch solution by eScholar.

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Today we will cover the solution overview, the matching process, match and download, CEP Manager features, system tools as well as system features and wrap up.
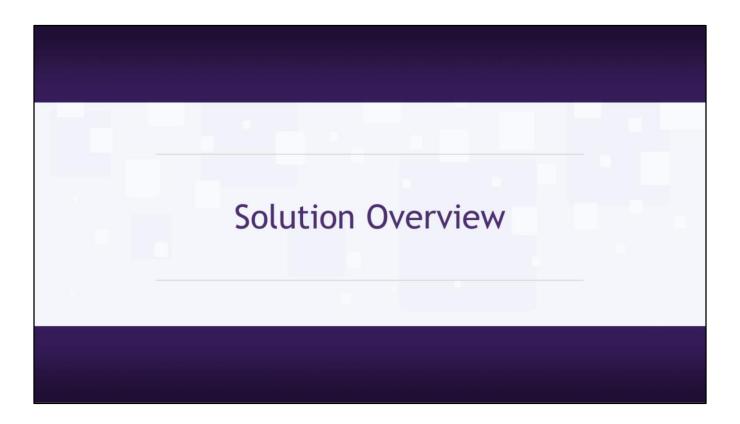
Objectives

At the end of today's training, participants will be able to describe:

- ✓ The matching logic used in the DirectMatch System.

- ✓ How to make a good match decision.

- ✓ The process for downloading Match Records.

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Solution Overview

Let's look at the solution overview.

DirectMatch Benefits

■ DirectMatch provides:

- ✓ A powerful matching engine
- ✓ A tracking and logging process for submission data
- ✓ An easy-to-use interface
- ✓ An organized and structured approach
- ✓ Secure and role-based access

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KeyConcepts

Master Index

eScholar Uniq-ID® Person ID has a Master Index, which is the individual unique identities for each person in the application. For example, each student is assigned a unique identifier and is in the Master Index.

Program Index

Each program that is available in DirectMatch has a Program Index, which is the individual records associated to the program. For example, the SNAP Index consists of all the SNAP records provided by USDA.

The concept of the master index and program index is important to the DirectMatch system.

The Master Index is the eScholar Uniq-ID Person index which contains unique identities for each individual in the system.

The Program Index contains data from programs such as SNAP, TANF, Foster or Medicaid. These are used as sources to match against in the DirectMatch system.

Key Concepts

Batches

A group of input records submitted to the system at the same time which are stored as a group and can be referred to by Batch Number.

Transactions

Individual records within a batch. Individual transactions may be accessed before an entire batch is finished processing.

Batch – A group of input records submitted to the system at the same time which are stored as a group and can be referred back to by Batch Number.
Transactions - Individual records within a batch. Individual transactions may be accessed before an entire batch is finished processing.

Match Decision – Each time a match request is performed with the Master Index and the Program Index, a Match Decision is produced to indicate if the records match. The available decisions are Match, No Match and Near Match.

Match - When a match request is performed, a Match is returned when the match candidate record has a match score above the Upper Near Match Threshold. A Match decision links the records together.

Near Match - When a match request is performed, a Near Match is returned when the match candidate record has a match score between the Lower Near Match and the Upper Near Match Threshold. A user must review and resolve the record.

All data displayed throughout this presentation and in the supporting resources is not real data.

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The Matching Process

Matching Process Overview

Let's take a look at the overview of the matching process.

First, records are submitted to the system. We will refer to these records as 'Input Records' in this presentation.

Next, the Matching engine develops an index of DirectMatch records.

The Matching engine compares the records and provides a match decision.

Proven Matching Process

This graphic is a representation of the steps the DirectMatch system uses to determine the eligibility of students to the various programs such as SNAP, TANF, Foster, Medicaid or other programs.

Proven Matching Process

SUBMISSION:
Data can be submitted via File Upload, Web Services, Online Entry, SIF, or AFP.

PRE-PROCESS:
File and data validations are performed to ensure data quality and master data is indexed.

SEARCH:
A search is performed using matching fields such as name, date of birth and address and matching rules are applied.

REFINE:
Apply matching rules and perform secondary searches as appropriate.

SCORE:
A score is generated for each potential candidate with a 0-100 range and additional matching rules are applied.

RESOLVE:
The Match Decision is generated as a Match, No Match or Near Match. Near Matches require human intervention.

LINK:
Each person has a unique identifier which can be downloaded or returned via Web Services, SIF or AFP.

First, records are submitted to the system in an input file called a batch. The input file or batch goes through a validation process to be sure the records meet the required format.

Proven Matching Process

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LINK:
Each person has a unique identifier which can be downloaded or returned via Web Services, SIF or AFP.

Next, the system searches the program index and applies any matching rules that have been set by the state system administrator.

Proven Matching Process

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Data can be submitted via File Upload, Web Services, Online Entry, SIF, or AFP.

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RESOLVE:
The Match Decision is generated as a Match, No Match or Near Match. Near Matches require human intervention.

LINK:
Each person has a unique identifier which can be downloaded or returned via Web Services, SIF or AFP.

The DirectMatch system generates a score and compares the score to the matching thresholds to determine if each record is a Match, No Match or Near Match. No Match records require no further action. Near Match records require human intervention. We will discuss that process in depth later in this training.

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Proven Matching Process

SUBMISSION:
Data can be submitted via File Upload, Web Services, Online Entry, SIF, or AFP.

PRE-PROCESS:
File and data validations are performed to ensure data quality and master data is indexed.
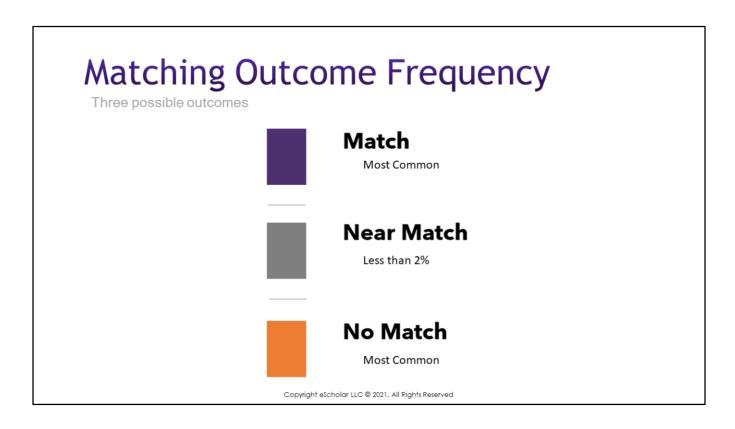
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Each person has a unique identifier which can be downloaded or returned via Web Services, SIF or AFP.
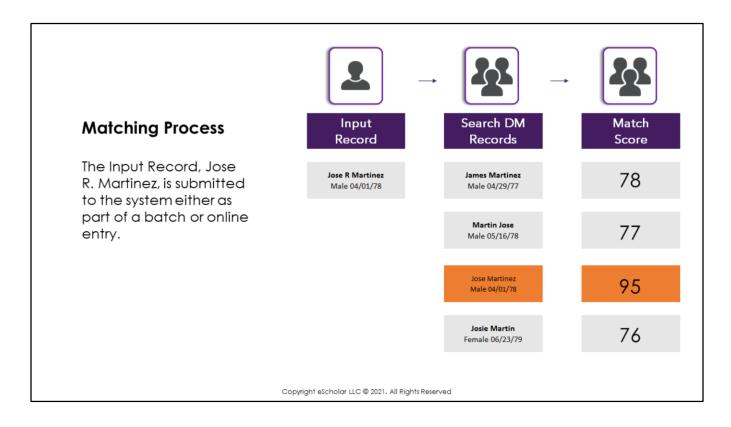
All Matched records will be linked to the appropriate program record, and they can be downloaded from the system. The file can then be uploaded into the source system.

In the "DirectMatch" process there are 3 possible outcomes as shown here:
Match, No Match and Near Match.

Matching Outcome Frequency

Three possible outcomes

Match
Most Common

Near Match
Less than 2%

No Match
Most Common

Match and No Match results are the most common occurrence. The Near Match result generally occurs in less than 2% of the matching cases. The near match records require human intervention to resolve. More about that later.

Matching Process

The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch or online entry.

Input Record	Search DM Records	Match Score
Jose R Martinez Male 04/01/78	James Martinez Male 04/29/77	78
	Martin Jose Male 05/16/78	77
	Jose Martinez Male 04/01/78	95
	Josie Martin Female 06/23/79	76

Let's look at an example of a record going through the matching process.

Student Jose R. Martinez is submitted to the system.

The matching engine develops from the master records a candidate record index containing all the records that the matching engine thinks might match the input record.
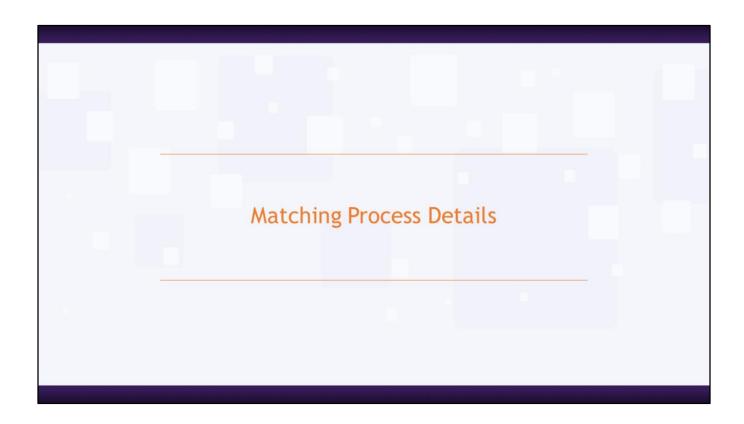
The matching engine logic accounts for spelling errors, nicknames, etc.

Then the matching engine compares the input record, to each record in the DirectMatch system and assigns a match score for each comparison.
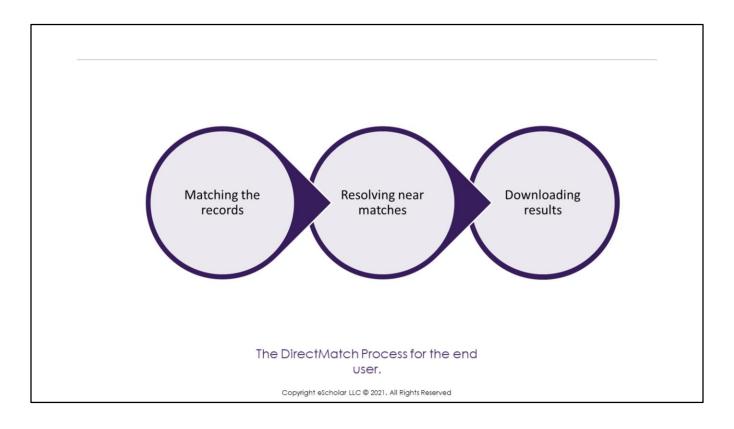
Here you can see the match score results when comparing the input record to the DirectMatch system.

The match score is used to determine if the input record is a match, a near match or no match to any of the DirectMatch records. When making this decision the matching engine takes into account the thresholds that have been configured.
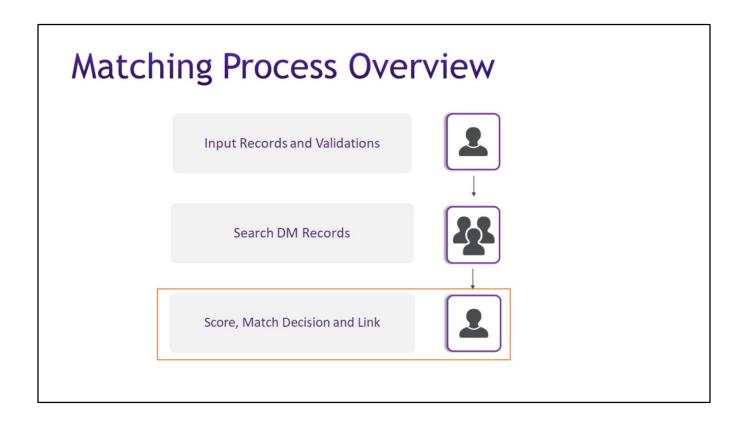
In this example, we can see that Jose R. Martinez and Jose Martinez share a match on the first name, last name, as well as gender and birthdate. He therefore received the matching score of 95. This record is considered a match and Jose will be linked to the program record.

Matching Process Details

The Matching Process Details

Matching the records → Resolving near matches → Downloading results

The DirectMatch Process for the end user.

The DirectMatch Process for the end user includes matching the records, resolving near matches and downloading the results.
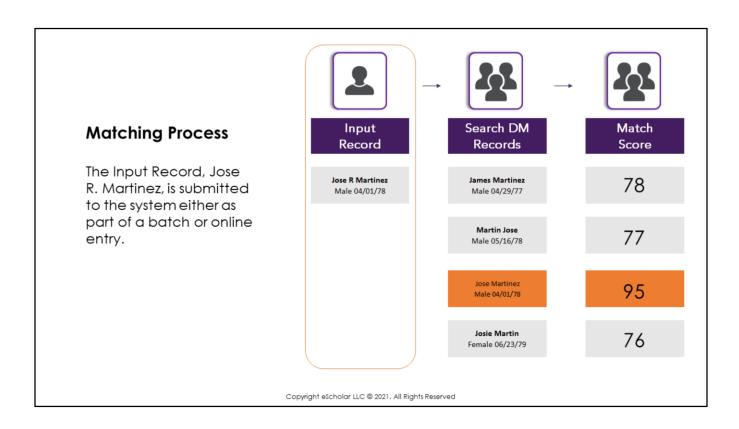
First, records are submitted to the system . We will refer to these records as 'Input Records' in this presentation.

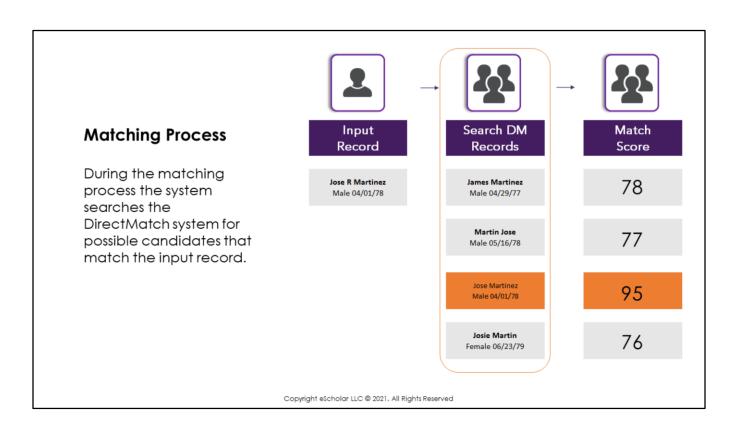Next, the Matching engine develops an index of DirectMatch records.

The Matching engine compares the records and provides a match decision.

In most cases the records will be submitted by the Secure ID users and the DirectMatch user will only work within the highlighted portion of the system.

Let's look at an example.

Matching Process

The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch or online entry.

Input Record	Search DM Records	Match Score
Jose R Martinez Male 04/01/78	James Martinez Male 04/29/77	78
	Martin Jose Male 05/16/78	77
	Jose Martinez Male 04/01/78	95
	Josie Martin Female 06/23/79	76

The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch, automatic file processing or an online entry.

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Matching Process

During the matching process the system searches the DirectMatch system for possible candidates that match the input record.

Input Record	Search DM Records	Match Score
Jose R Martinez Male 04/01/78	**James Martinez** Male 04/29/77	78
	Martin Jose Male 05/16/78	77
	Jose Martinez Male 04/01/78	95
	Josie Martin Female 06/23/79	76

During the matching process, the system searches the DirectMatch system for possible candidates that match the input record.

Matching Engine

Last Name: High Weight, Required

First Name: High Weight, Required

Middle Name: High Weight

Birth Date: Medium Weight, Required

Gender: Low Weight , Required

Input Record

Search Candidates

Search Results

The Matching Engine uses the last name, first name, birth date and, gender for matching. The last name and first name have a high weight and are required. The middle name is a high weight if provided. The birthdate is a medium weight and gender is low weight. Both the birthdate and gender are required.

Matching Engine Exceptions

Exception Examples

Errors in spelling: Tomas instead of Thomas

Nicknames: Bill or William

Mixed usage: John Thomas or Thomas John

Multi-part names: Anderson-Lott or Lott

Uncommon Names: Leniency on misspellings

Punctuation: Removes punctuation

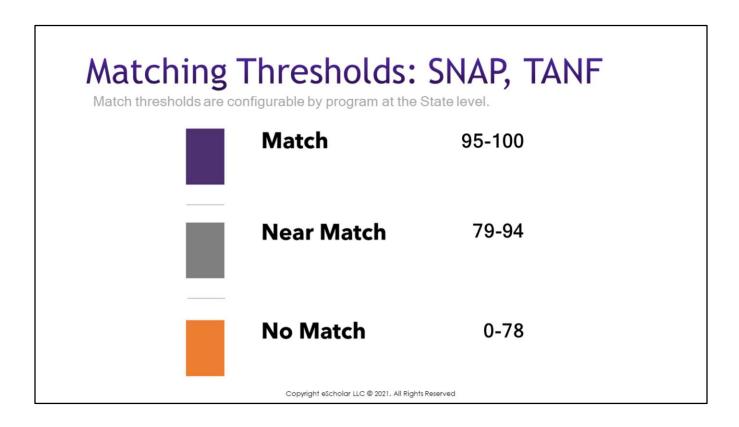The matching engine employs over 300 different algorithms to catch different variations.

The matching engine accounts for exceptions such as misspellings, nicknames, hyphenated names, etc.
This only a partial list of the exceptions.
The Matching engine employs 300 different algorithms to catch different variations.
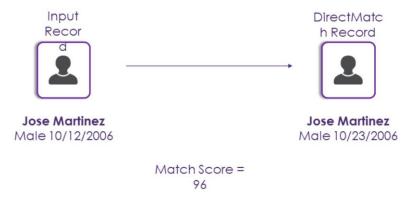
Matching Process

Based upon the search results, the system generates a Match Score for each record. In this example, we can see that Jose Martinez is the closest match to the input record and is given a match score of 95.

Input Record	Search DM Records	Match Score
Jose R Martinez Male 04/01/78	James Martinez Male 04/29/77	78
	Martin Jose Male 05/16/78	77
	Jose Martinez Male 04/01/78	95
	Josie Martin Female 06/23/79	76

Based upon the search results, the system generates a Match Score for each record. In this example, we can see that Jose Martinez is the closest match to the input record and is given a match score of 95.

Matching Thresholds: SNAP, TANF

Match thresholds are configurable by program at the State level.

■	**Match**	95-100
■	**Near Match**	79-94
■	**No Match**	0-78

The Match decision is determined by comparing the match score to the thresholds. The thresholds can be configured by the State at the program level. This example shows the match thresholds for the SNAP and TANF programs. The match threshold is currently set at 95-100, near match is 79-94 and no match is 0-78. Other programs such as Medicaid and Foster may use different matching thresholds.

Match

Input Record
DirectMatch Record

Jose Martinez
Male 10/12/2006

Jose Martinez
Male 10/23/2006

Match Score = 96

The input record is determined to be a match with one of the DirectMatch records.
In this case the match score is 96 and the linked records number is assigned.
There is no need to review these records.

Match Record.
The input record is determined to be a match with one of the DirectMatch records.
In this case the match score is 96 and the linked records number is assigned.
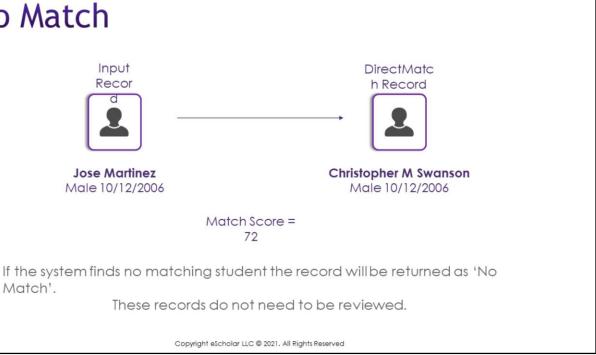There is no need to review these records.

No Match

Input Record

DirectMatch Record

Jose Martinez
Male 10/12/2006

Christopher M Swanson
Male 10/12/2006

Match Score =
72

If the system finds no matching student the record will be returned as 'No Match'.

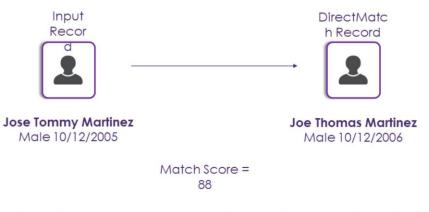These records do not need to be reviewed.

No Match record.
If the system does not find a matching student, the record will be returned as 'No Match'.
These records do not need to be reviewed.

Near Match

Input Record

Jose Tommy Martinez
Male 10/12/2005

DirectMatch Record

Joe Thomas Martinez
Male 10/12/2006

Match Score = 88

The DirectMatch system can not determine whether or not these students are the same.
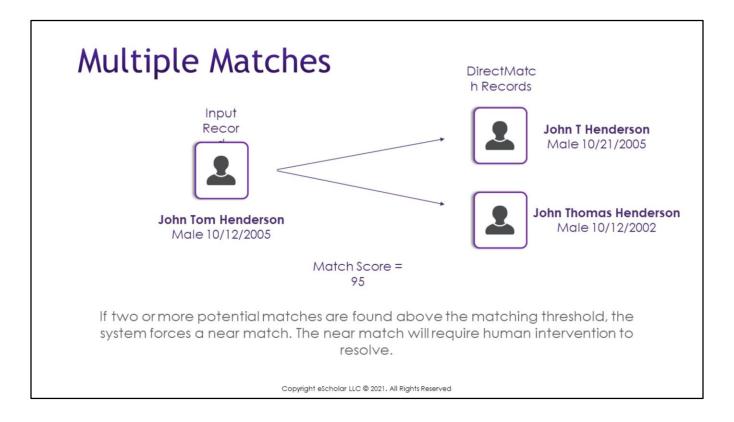Near matches require human intervention to resolve.

Near Match record.
In this example names are close but not exact.
The Birthdates are close.
The Match score flags this as a near match.
Since the DirectMatch system can not determine if these students are the same person,
this decision will require human intervention to resolve.

Multiple Matches
In this example we see that John Tom Henderson has two potential matches in the DirectMatch system. Since both matches are above the matching threshold, the system forces a near match. The near match will require human intervention to resolve.

Poll #1

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- ➤ Match
- ➤ Near Match
- ➤ No Match
- ➤ All of the above

Poll #1

Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- ➤ Match
- ➤ Near Match
- ➤ No Match
- ➤ All of the above

Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

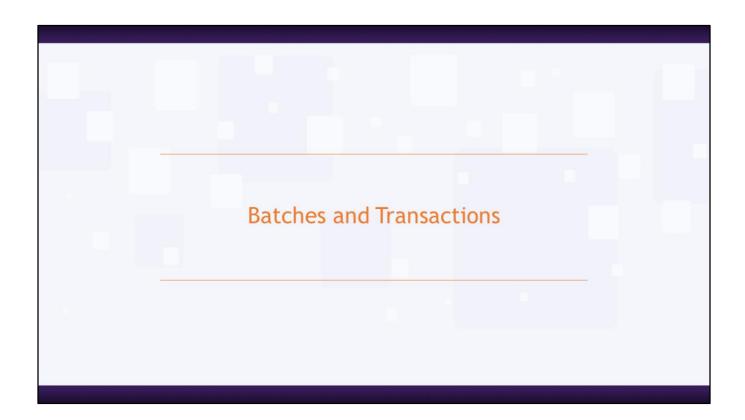- ➤ Match
- ➤ **Near Match**
- ➤ No Match
- ➤ All of the above

The DirectMatch System

Now let's look at the DirectMatch System.

Batches and Transactions

Batches and Transactions

The DirectMatch System

Home

Pending Work

Population Status	**Due 5/1**
Election Status	**Due 6/30**

District Summary

Schools

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Recent Activity

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent

	Batch Info	Match Type	Location Info	Process Info	Record Info
⚠	12584 DM Person ID (State)	**TANF**	**State Batch**	07/06/2021 5:07 PM	328 of 8000 PENDING
⚠	12583 THEV3FILE_NEW.txt File	**SNAP**	**District of Columbia** (002) *Christian Acres Youth Center Inc.* (002003)	07/06/2021 3:27 PM	1 of 1 PENDING
⚠	12582 THEV3FILE_NEW.txt File	**SNAP**	**District of Columbia** (002) *Christian Acres Youth Center Inc.* (002003)	07/06/2021 3:27 PM	1 of 1 PENDING

The user's landing page is determined by the user's role. The DirectMatch page will be the default page for all DirectMatch users.

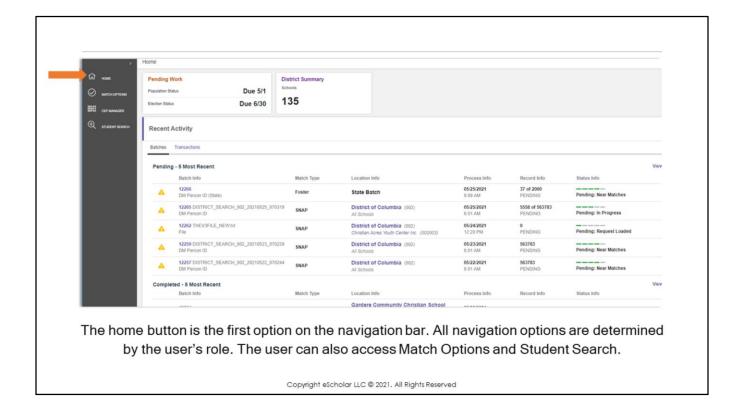The menu bar on the left side of the page is the main navigation tool.
Click the > sign to expand the menu.

The menu bar on the left side of the page is the main navigation tool.
Click the > sign to expand the menu.

The home button is the first option on the navigation bar. All navigation options are determined by the user's role. The user can also access Match Options and Student Search.
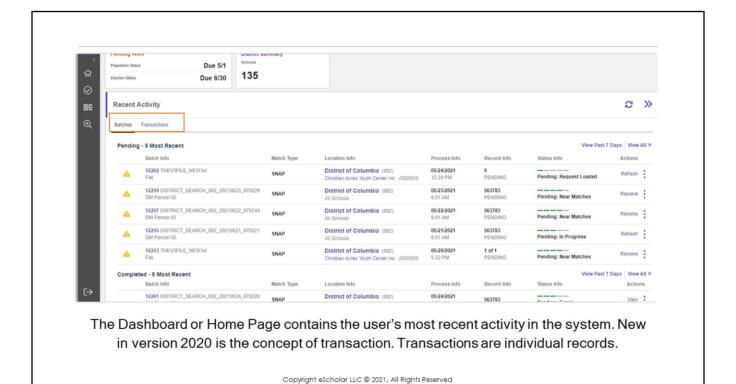
The home button is the first option on the navigation bar.
All navigation options are determined by the user's role.
The user can also access Match Options and Student Search.
The CEP Manager option will only appear on the menu if the user has rights to CEP Manager.

Pending Work
Population Status	Due 5/1
Election Status	Due 6/30

District Summary
Schools
135

Recent Activity

Batches Transactions

Pending - 5 Most Recent
View Past 7 Days | View All »

	Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
⚠	12262 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/24/2021 12:20 PM	0 PENDING	Pending: Request Loaded	Refresh ⋮
⚠	12259 DISTRICT_SEARCH_002_20210523_070229 DM Person ID	SNAP	District of Columbia (002) All Schools	05/23/2021 6:01 AM	563783 PENDING	Pending: Near Matches	Resolve ⋮
⚠	12257 DISTRICT_SEARCH_002_20210522_070244 DM Person ID	SNAP	District of Columbia (002) All Schools	05/22/2021 6:01 AM	563783 PENDING	Pending: Near Matches	Resolve ⋮
⚠	12255 DISTRICT_SEARCH_002_20210521_070221 DM Person ID	SNAP	District of Columbia (002) All Schools	05/21/2021 6:01 AM	563783 PENDING	Pending: In Progress	Refresh ⋮
⚠	12253 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/20/2021 5:22 PM	1 of 1 PENDING	Pending: Near Matches	Resolve ⋮

Completed - 5 Most Recent
View Past 7 Days | View All »

	Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
	12261 DISTRICT_SEARCH_002_20210524_070226	SNAP	District of Columbia (002)	05/24/2021	563783		View ⋮

The Dashboard or Home Page contains the user's most recent activity in the system. New in version 2020 is the concept of transaction. Transactions are individual records.
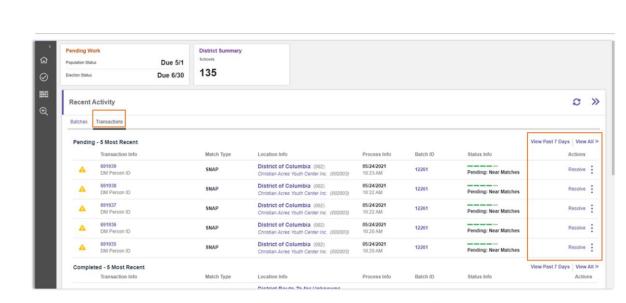
The Dashboard or Home Page contains the user's most recent activity in the system.
The dashboard displays the most recent batch information. Batches are a group of records submitted to the system at the same time.
New in version 2020 is the concept of transactions.
Transactions are individual records.
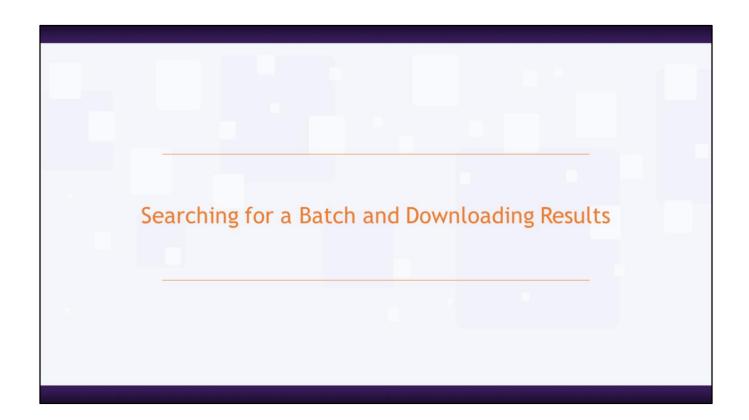Users may view and work on individual transactions before an entire batch of records completes processing.

Transactions are individual records. The five most recent pending transactions are shown on this page. On the right side of the page, the user may view all pending transactions, view the past 7 days or take action to resolve the near matches.
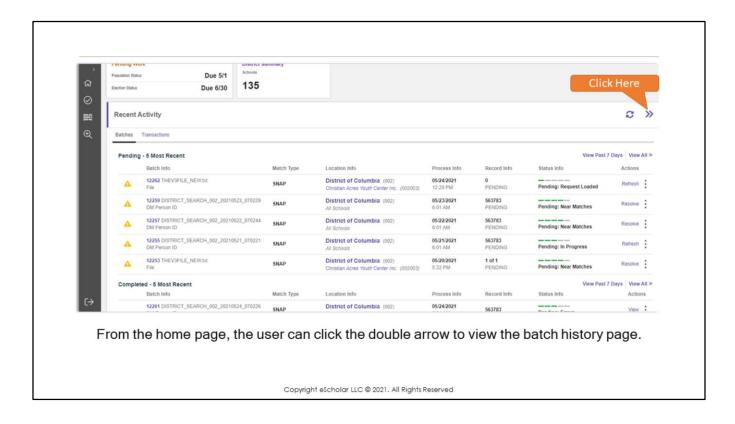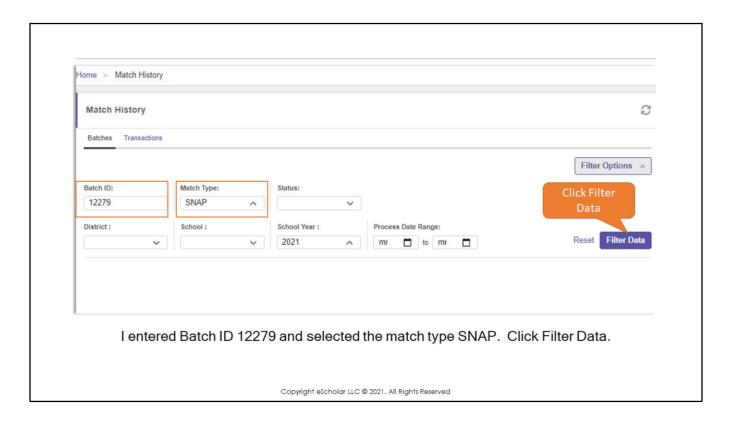
Transactions are individual records. The five most recent pending transactions are shown on the transaction page.
On the right side of the page, the user may view all pending transactions, view the past 7 days or take action to resolve the near matches.
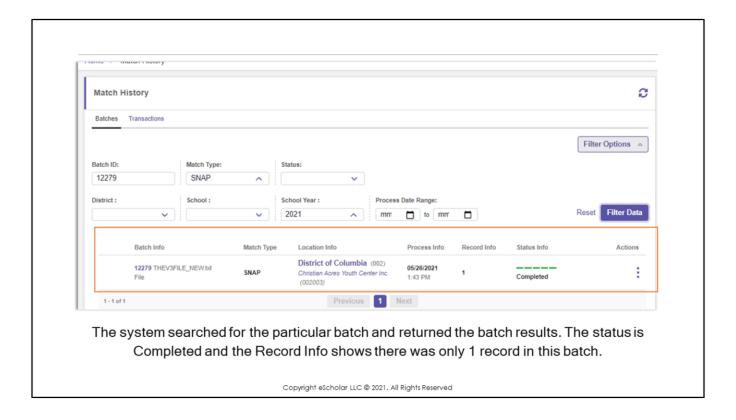
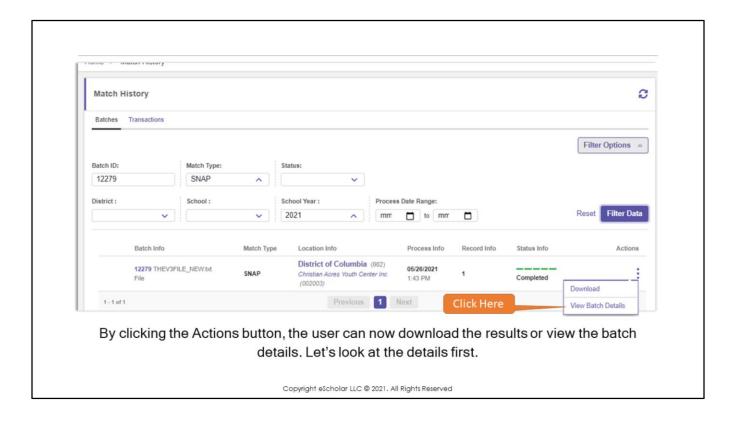Searching for a Batch and Downloading Results

Searching for a Batch and Downloading Results

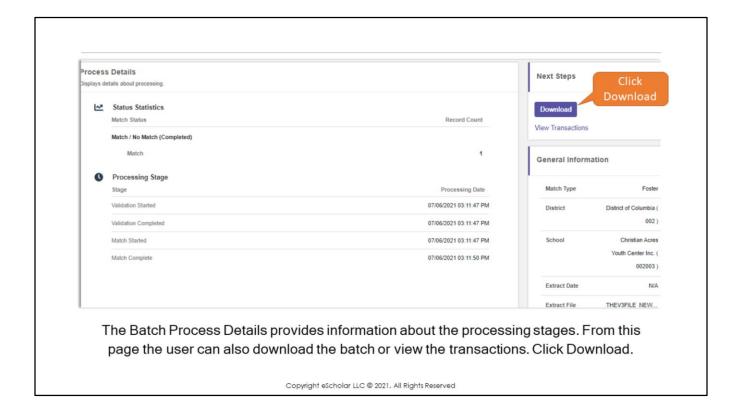From the home page, the user can click the double arrow to view the batch history page.

From the home page, the user can click the double arrow to view the batch history page.

Home > Match History

Match History

Batches   Transactions

Filter Options ▲

Batch ID:
12279

Match Type:
SNAP ∧

Status:
∨

Click Filter Data

District:
∨

School:
∨

School Year:
2021 ∧

Process Date Range:
mr 🗓 to mr 🗓

Reset   **Filter Data**

I entered Batch ID 12279 and selected the match type SNAP. Click Filter Data.

I entered Batch ID 12266 and selected the match type SNAP. Click Filter Data.
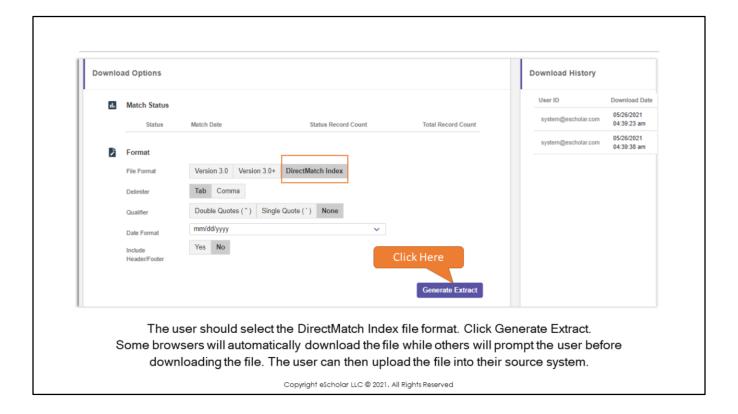
The system searched for the particular batch and returned the batch results. The status is Completed and the Record Info shows there was only 1 record in this batch.

By clicking the Actions button, the user can now download the results or view the batch details. Let's look at the details first.

The Batch Process Details provides information about the processing stage. From this page the user can also download the batch or view the transactions. Click Download.

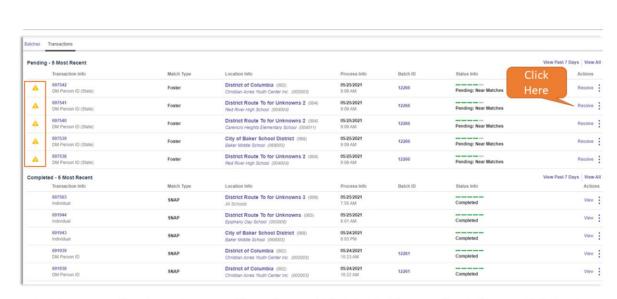The user should select DirectMatch Index file format.
Click Generate Extract.
Some browsers will automatically download the file while others will prompt the user before downloading the file.
The user can then upload the file into their source system.
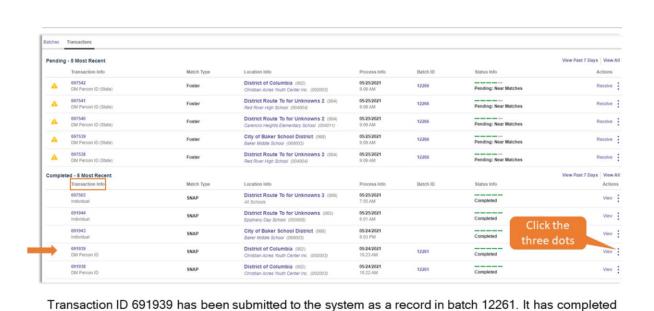
The Match and No Match Process

Now let's follow the matching process from the beginning to the end for Match and No Match records.

In this new version, items that are still pending are highlighted with a warning indicator which lets the user know further action is needed. The user will click Resolve to see the near matches and choose an appropriate resolution. More about near matches later in this session.
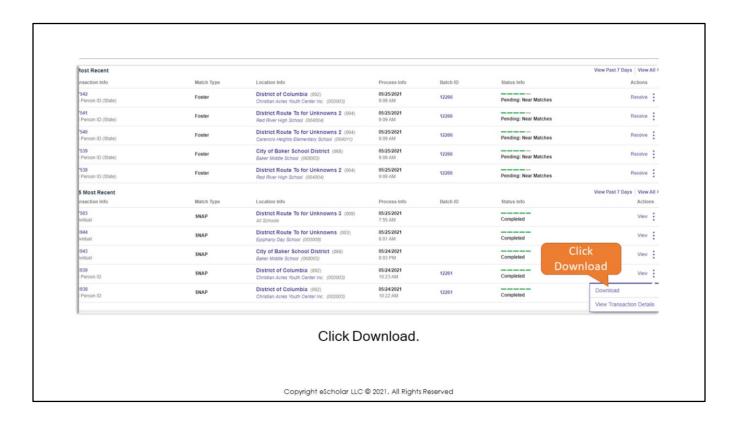
In this new version, items that are still pending are highlighted with a warning indicator which lets the user know further action is needed. The user will click Resolve to see the near matches and choose an appropriate resolution. More about near matches later in this session.

Transaction ID 691939 has been submitted to the system as a record in batch 12261. It has completed processing. Click the three dots. The same process works for batches that have completed processing.

Individual records or transactions will be submitted to the system, processed and the result will be match, no match or near match. Match records can be downloaded. No match records require no furthe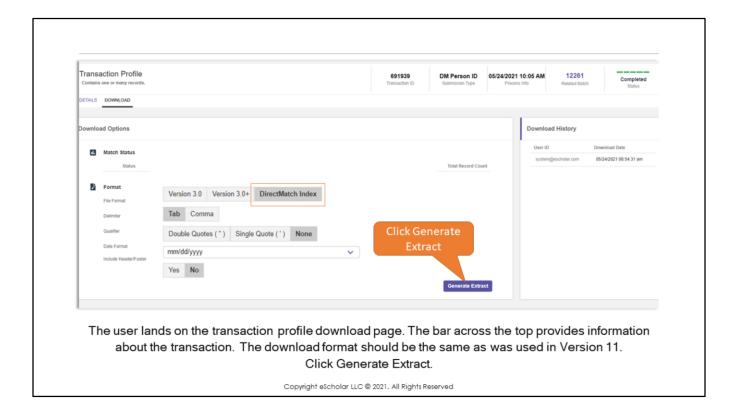r action. Near match records must be resolved by human intervention. Transaction ID 691939 has been submitted to the system as a record in batch 12261. It has completed processing. Click view to download the record.

Click Download.

Click download.

The user lands on the transaction profile download page. The bar across the top provides information about the transaction. The download format should be the same as was used in Version 11.
Click Generate Extract.

The extract file is shown below the format information. Click Refresh if the file hasn't completed.

The extract file is shown below the format information. Click Refresh if the file hasn't completed.

Click download to download the transaction. This process works exactly the same for batches. For a transaction, you are downloading only one record. For a batch, you are downloading all records in the batch. You can open the file in Notepad or load matched records to your source system.

Poll #2

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Poll #2

What is the difference between a batch and a transaction?
Answers:
- ➤ A batch is many records submitted at the same time; a transaction is only one record.
- ➤ A batch is only output records; a transaction is input and output records.
- ➤ A batch has an ID and a transaction does not.

What is the difference between a batch and a transaction?

Answers:
- ➤ A batch is many records submitted at the same time; a transaction is only one record.
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What is the difference between a batch and a transaction?

Answers:

➢ **A batch is many records submitted at the same time; a transaction is only one record.**

➢ A batch is only output records; a transaction is input and output records

➢ A batch has an ID and a transaction does not.

Near Match

Next let's take a deeper look at the matching process for Near Match records.

Batch 12342 contains TANF data with Pending Near Matches. The near matches must be resolved before the user can download the entire batch. Click Resolve.

When drilling in, the system filters on batch ID 12342 and displays all the transactions in the near match status. Monique Whitehead has 1 potential match. Click the downward triangle to see the potential near match.

The submission record shows Monique Whitehead, Female with DOB 09/09/1998. On this screen we can see 1 potential near match, Monique Whitehead with a different birthdate. The user should click either double arrow to see more information.

The Compare Records Page:

- ✓ On the compare records page, the fields with differences are highlighted in yellow.
- ✓ Scroll down to see additional data fields before making a match decision.
- ✓ In this case we see the birthdates are different, but the social security number is the same.
- ✓ The user should investigate the birthdate at the district level.

- ✓ On the compare records page, the fields with differences are highlighted in yellow.
- ✓ Scroll down to see additional data fields before making a match decision.
- ✓ In this case we see the birthdates are different, but the social security number is the same.
- ✓ The user should investigate the birthdate at the district level.

Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:

Match

No Match

Cancel Record

The user must investigate the student data at the school district. Then, the user will select the near match resolution from the three possible resolutions:
Match

Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:

Match   **No Match**   Cancel Record

No Match

Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:

Match

No Match

Cancel Record

Cancel Record

The user can select Match, No Match or Cancel Submission Record from the top of the comparison screen. For Match, choose Match: ID 0000003512597 or choose Cancel Record or No Match. The Match ID Source is identified above the Match button. In this case the Source is the TANF program record.

The user can select Match, No Match or Cancel Submission Record from the top of the comparison screen. For Match, choose Match: ID 0000003512597 or choose Cancel Record or No Match. The Match ID Source is identified above the Match button. In this case the Source is the TANF program record.

The user can also select Match, No Match or Cancel Submission Record from the bottom of the screen.
For Match, choose Match: ID 0000003512597, or choose Cancel Record or No Match.

For our first example, Monique Whitehead, we have reviewed the data and decided that the Near Match Record matches the Submission Record. Again, note the Match ID number Source is TANF. Let's click the Match button.

The Confirm Decision pop-up appears.
Click Yes Select Match.

NEAR MATCHES FOUND: The system found Near Matches which should be reviewed and resolved by a user.

Next Steps: Review Near Matches below

1
Near Matches

Filter Options ▽

Transaction ID :	Batch ID :	Submission Type :	Match Type :
	920	⌄	⌄

District :	School :	School Year :	Sort By :
⌄	⌄	2020 ⌄	Max Match Score ... ⌄

Reset **Filter Data**

Pending Near Matches

Submission Record
Andrea L Hartman
Acadia Parish *(027)*
Brownfields Elementary School *(027018)*

DOB: **02/01/1992**
Grade: **4**
Local ID: **1122**

Race: **White**
Gender: **Female**
SSN: **123-45-6789**

94% Max Match Score

2 Potential Matches

▽ ⊘ »

The user is returned to the Near Matches Found panel.
From here, the user can continue to resolve near matches or select the home button.

The user is returned to the Near Matches Found panel.
From here, the user can continue to resolve near matches or select the home button.

	SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD

Pending Near Matches Queued
A Match Decision is required.
Record submitted by Andrea Hartman on 05/12/2021

View Pending Near Match List
View Transaction Details

Click No Match

Cancel Submission Record   **No Match**

	SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
	SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE: SNAP
		94% Match Score	87% Match Score	87% Match Score
		Match: ID 9818404011	Match: ID 9818404111	Match: ID 9818404122
Matching Fields		❗	❗	❗
First Name	Oliver	Oliver	Oliver	Oliver
Middle Name		S		L

Now let's look at a No Match example. After revieing the data for Oliver Jones, we have decided that none of the options are a match to the submission record.
Click No Match.

Now let's look at a No Match example. After revieing the data for Oliver Jones, we have decided that none of the options are a match to the submission record.
Click No Match.

Again, the Confirm Decision pop-up appears.
Click Yes Select No Match.

Again, the Confirm Decision pop-up appears.
Click Yes Select No Match.

	SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD

Match Decision
The submission record was not matched to an existing record.
Resolved by: Elaine Rulla on 07-07-2021

View Pending Near Match List
View Transaction Details

	SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
	SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE: SNAP
		94%	87%	87%
		Match Score	Match Score	Match Score
		No Match	No Match	No Match
Matching Fields		🔴	🔴	🔴
First Name	Oliver	Oliver	Oliver	Oliver
Middle Name		S		L
Last Name				

When selecting No Match, the No Match Decision Panel appears on the top of the page. If there are additional Near Matches to be resolved in the batch, the No Match Decision panel will contain the option to View the Pending Near Match List. If there are no additional near matches in the batch, the No Match Decision Panel will contain the options to View Home Page or View Transaction Details.

When selecting No Match, the No Match Decision Panel appears on the top of the page.
If there are additional Near Matches to be resolved in the batch, the No Match Decision panel will contain the option to View the Pending Near Match List.
If there are no additional near matches in the batch, the No Match Decision Panel will contain the options to View Home Page or View Transaction Details.

Match Decision

The submission record was not matched to an existing record.

Resolved by: Elaine Rulla on 07-07-2021

Select View Pending Near Match List

View Pending Near Match List

View Transaction Details

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE: SNAP
	94%	87%	87%
	Match Score	Match Score	Match Score
	No Match	No Match	No Match
Matching Fields			
First Name **Oliver**	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name			

The user can select View Pending Near Match List to view other near matches in the batch.

The user can select View Pending Near Match List to view other near matches in the batch.

Poll #3

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Poll #3

What are the three possible resolutions for a Near Match?

Answers:

- ➢ Match, Input, Validation.
- ➢ Near Match, No Match, Input Record.
- ➢ Match, No Match, Cancel Record.
- ➢ All of the above.

What are the three possible resolutions for a Near Match?

Answers:

- ➢ Match, Input, Validation.
- ➢ Near Match, No Match, Input Record.
- ➢ Match, No Match, Cancel Record.
- ➢ All of the above.

Poll #3

What are the three possible resolutions for a Near Match?

Answers:

- ➢ Match, Input, Validation
- ➢ Near Match, No Match, Input Record
- ➢ **Match, No Match, Cancel Record**
- ➢ All of the above

What are the three possible resolutions for a Near Match?

Answers:

- ➢ Match, Input, Validation
- ➢ Near Match, No Match, Input Record
- ➢ Match, No Match, Cancel Record
- ➢ All of the above

Downloading Match Records

Downloading Match Records

We are back on the home screen where we can view the Pending-5 most recent and Completed-5 most recent. Let's look at batch 12266. Click Download.

On the batch profile page, select the file format DirectMatch Index and click Generate Extract. The user can then refresh the page if needed and download the file.

The DirectMatch Download

✓Includes the students which were matched during the specific file or Batch upload.

✓The export does not include students that were matched previously in the same school year.

The DirectMatch Download:

- Includes the students which were matched during the specific file or Batch upload.
- The export does not include students that were matched previously in the same school year.

Poll #4

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Poll #4

What does a batch download contain?

Answers:

- ➢ Batch downloads contain all records for the entire school year.
- ➢ Batch downloads contain only one record.
- ➢ Batch downloads contain all records that were matched during the specific file upload.
- ➢ All of the above.

Poll #4

What does a batch download contain?

Answers:
- Batch downloads contain all records for the entire school year.
- Batch downloads contain only one record.
- **Batch downloads contain all records that were matched during the specific file upload.**
- All of the above

Match Options: Person and Address

Match Options: Person

Person

To access match options from the navigation bar, click the checkmark icon.
The options are: Person ID, Upload File, Individual Match and Manual Authorization.

Person ID selection uses the Secure ID data to match against the program data for the program selected. Select the program SNAP. Click Match.

The Person ID match has completed. The user can download the file by clicking Download.

Upload File: The file you upload may contain students who do not yet have a Secure ID. Otherwise, use Person ID to Match. In this example, the user has selected SNAP for the match type. Click Browse to locate the file you wish to upload. Then click Match.

Click Individual Match to enter information for a specific student.

Individual Match

- ✓ Select the Match Type
- ✓ Enter the student information
- ✓ First Name - required
- ✓ Last Name - required
- ✓ Gender
- ✓ Date of Birth
- ✓ The more information you can provide, the more accurate the search result.

On the Individual Match Tab:
- ✓ Select the Match Type
- ✓ Enter the student information
- ✓ First Name - required
- ✓ Last Name – required
- ✓ Gender
- ✓ Date of Birth
- ✓ The more information you can provide, the more accurate the search result.

Scroll down and click Match at the bottom of the page.

Manual Authorization: The user can manually add a student to a specific program through the Manual Authorization tab. The user enters the student Secure ID and clicks Match.

Manual Authorization: The user can manually add a student to a specific program through the Manual Authorization tab. The user enters the student Secure ID and clicks Match.

Jazmin Rubio *(1007179317)*
139 Gedney Cir,
Bernice, LA 70481

District of Columbia *(002)*
Christian Acres Youth Center
Inc. *(002003)*

DOB: **2004-04-18**
Gender: **Female**
Grade:

Click Edit

Manual Match Type

Eligiblilty Type	Start Date	End Date

All Other Match Types

Eligibility Type	Identified Date	Match Source	Location Info
SNAP	08/06/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth Center Inc. (002003)
TANF	06/03/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth Center Inc. (002003)

The match result is displayed along with the other match types that have been assigned to this student. Click Edit.

The match result is displayed along with the other match types that have been assigned to this student. Click Edit.

Click Add a New Program.

Jazmin Rubio *(1007179317)*
139 Gedney Cir,
Bernice, LA 70481

District of Columbia *(002)*
Christian Acres Youth Center Inc. *(002003)*

DOB: **2004-04-18**
Gender: **Female**
Grade:

Manual Match Type

Eligiblilty Type

Even Start
Homeless
Migrant

Start Date
mm/dd/yyyy

End Date
mm/dd/yyyy

match reason

+ Add A New Program

Cancel   **Update**

Select the Manual Match Type, which is Homeless in this example. The Manual Match Eligibility Type list is based on the user's role. Not all users will have access to all Eligibility Types.

Select the Manual Match Type, which is Homeless in this example. The Manual Match Eligibility Type list is based on the user's role. Not all users will have access to all Eligibility Types.

101

The user must enter the start date and match reason. Click Update.

The Manual Match, Homeless in this case, will display under the Manual Match Type. All
other program matches will display below.

Match Options: Address

Match Options: Address

Under Match Options, click Address.

Match Options

PERSON   ADDRESS

CEP DC Extended Match
View and match household addresses for DC Extended.

05/18/2021
Last Run Date

DONE
Status

79
Matches Queued

Click Run Now

Match Results

Run Now

Address matching compares addresses of student in Person ID to the addresses of students in the state programs such as SNAP. Additional students may be identified by matching the addresses if the students live in the same household. Under Match Options, click Address. Click Run Now.

Address matching compares addresses of students in Person ID to the addresses of students in the state programs such as SNAP. Additional students may be identified by matching the addresses if the students live in the same household. Under Match Options, click Address. Click Run Now.

The address matching found three potential matches with match scores of 98, 93 and 91 respectively. Let's look at each of these examples.

The address matching found three potential matches with match scores of 98, 93 and 91 respectively. Let's look at each of these examples.

The eligible address is 40 Kass Rd and the matched address is 40 Kasse Rd with a different spelling. The city, state and zip are the same. This is most likely the same address. Users at the district level should be able to determine if this is the same address or not. Clicking the checkmarks will match one or all of the students as shown on the screen. Since the user has determined that this is the same address, click Match.

The eligible address is 40 Kass Rd and the matched address is 40 Kasse Rd with a different spelling. The city, state and zip are the same. This is most likely the same address. Users at the district level should be able to determine if this is the same address or not. Clicking the checkmarks will match one or all of the students as shown on the screen. Since the user has determined that this is the same address, click Match.

For the second example, the address 79 W Post Rd and 79 W New York Post Rd could be two different streets in the same town, White Castle, LA. After the users confirms that these addresses are distinct, the user should click No Match as shown on the screen.

For the second example, the address 79 W Post Rd and 79 W New York Post Rd could be two different streets in the same town, White Castle, LA. After the users confirms that these addresses are distinct, the user should click No Match as shown on the screen.

For the final example, the address 61 Rosewood Rd is the same. The user needs to investigate Saline Village, LA versus Robeline Village, LA both with the same zip code. If the user determines that these addresses are a match, click match for all students or click match for each student listed.

For the final example, the address 61 Rosewood Rd is the same. The user needs to investigate Saline Village, LA versus Robeline Village, LA both with the same zip code. If the user determines that these addresses are a match, click match for all students or click match for each student listed.

Poll #5

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Poll #5

What is the benefit to matching addresses?

Answers:

➤ Students may be declined admission to the school.

➤ Student may be identified for programs by living in the same household.

➤ Student may be required to move out of the district.

➤ All of the above.

Poll #5

What is the benefit to matching addresses?

Answers:

➢ Students may be declined admission to the school.

➢ **Student may be identified for programs by living in the same household.**

➢ Student may be required to move out of the district.

➢ All of the above.

CEP Manager

CEP Manager

The CEP Manager Icon is the abacus on the navigation panel.

✓ The icon will only appear if the user has rights to the CEP manager functions within Security Manager.

✓ CEP Manager allows the user to view, update and certify the Population and Election data.

HOME		
MATCH OPTIONS		
CEP MANAGER		
STUDENT SEARCH		

14

Recent Activity

BATCHES   TRANSACTIONS

Pending - 5 Most Recent

	Batch Info	Match Type
⚠	12274 DISTRICT_SEARCH_009_20210526_114519 DM Person ID	SNAP
⚠	12272 DISTRICT_SEARCH_002_20210526_070225 DM Person ID	SNAP
⚠	12270 DM Person ID (State)	TANF
⚠	12269 DM Person ID (State)	Foster
⚠	12268 DISTRICT_SEARCH_003_20210525_112257 DM Person ID	Medicaid

The CEP Manager Icon is the abacus on the navigation panel.
The icon will only appear if the user has rights to the CEP manager functions within Security Manager.
CEP Manager allows the user to view, update and certify the Population and Election data.

CEP Manager

The CEP Manager Instructions are on the bottom of the CEP Manager Page.

Instructions

1. The SFA must verify all fields and CEP data must be as of the date specified by the State.
2. To ensure up-to-date count of identified students, you should conduct one or more matches on Match Options page and resolve near matches as needed.
3. Once all data is verified, you must certify the information by checking the box next to the certification statement.
4. After certifying population data, you must click the "Submit" button.
5. Once the population data has been submitted and approved, you are ready to start CEP elections in Elections tab.
6. If you need to adjust your elections for schools, groupings, or district wide, please click on "Recalculate" and go to Recalculate Worksheet.
7. After adjusting your elections on Recalculate Worksheet, go back to Elections tab.
8. After certifying elections data, you must click the "Submit" button.

The CEP Manager Instructions are on the bottom of the CEP Manager Page.

POPULATION   ELECTIONS

Group: Population Testing Group	6 Total Identified	28 Total Enrolled	21.43 ↓ District ISP	Due 05/08 Population Status	Due 06/30 Election Status

2017   2018   2019   2020   **2021**

Location Summary

Click Here

School Code	Location Name	Identified/Enrolled	ISP %	Approval Status	A...
34570	CEP Testing School	3/10	30.00	⦿ Pending	⊘ ✓ ≫
5372	CEP Testing School - NE	0/0	0.00	⦿ Pending	⊘ ✓ ≫
3298	CEP Testing School 1	2/5	40.00	⦿ Pending	⊘ ✓ ≫
9555773	CEP Testing School 2	0/9	0.00	⦿ Pending	⊘ ✓ ≫
75909	CEP Testing School 3	1/4	25.00	⦿ Pending	⊘ ✓ ≫

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.   **Submit & Certify Population**

The population tab summary data displays the total identified, total enrolled, district trend, population status and election status due dates. The locations and the pending data are listed below the summary information. Click to see the data for the individual school. In this case, we selected school code 34570.

The population tab data displays the total identified, total enrolled, district trend, population status and election status due dates. The locations and the pending data are listed below the summary information. Click to see the data for the individual school. In this case, we selected school code 34570 .

On this page the user can view the students by program and the Student ID number. The green triangle indicates a manual match, and a green circle indicates a system match. The user will verify the data on this page for each program and each school. Click to return to the previous page.

Once the data has been reviewed, the user must submit and certify the population. Check the box next to the certification statement and click the Submit and Certify Population button.

Once the data has been submitted, the state must approve the data submission.

Once the state has approved the submission, the district will see the approved status indicator.
Now let's click the Elections tab. The elections data is only available after the state approves the population.

CEP MANAGER

POPULATION ELECTIONS

Group:									
Population Testing Group	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017 2018 2019 2020 **2021**

Elections

	School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist. | New	Approval Status	Actions
⋮	--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes | Yes	✔ Approved	Participating ⊘ ✓ »
▪	5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No | --	⊘ Rejected	Not Participating ⊘ ✓ »
▪	9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No | No	✔ Approved	Not Participating ⊘ ✓ »

1 - 3 of 3   Previous **1** Next

Reopen Submission

On this page we can view the detailed elections data including the location name, the total identified, the total enrolled, the ISP, the Calculated ISP, the existing or new participation and the approval status. On the left of the screen, the user will see the eligibility indicators. Green indicators are eligible, yellow are near eligible and red indicators are not eligible.

On this page we can view the detailed elections data including the location name, the total identified, the total enrolled, the ISP, the Calculated ISP, the existing or new participation and the approval status. On the left of the screen, the user will see the eligibility indicators. Green indicators are eligible, yellow are near eligible and red indicators are not eligible.

CEP MANAGER

POPULATION   ELECTIONS

Group: Population Testing Group ⌄	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017   2018   2019   2020   **2021**

Elections

	School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist. | New	Approval Status	Actions	
⋮	--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes | Yes	✔ Approved	Participating	⊘ ✔ »
▪	5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No | --	⊘ Rejected	Not Participating	⊘ ✔ »
▪	9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No | No	✔ Approved	Not Participating	⊘ ✔ »

1 - 3 of 3   Previous **1** Next

Reopen Submission

The ISP is the proportion of students who are directly certified or categorically eligible for free school meals through means other than a school meal application and who are not subject to verification. To determine the Identified Student Percentage (ISP), SFAs and schools divide the number of identified students by the number of enrolled students, and then multiply by 100.

The ISP is the proportion of students who are directly certified or categorically eligible for free school meals through means other than a school meal application and who are not subject to verification. To determine the Identified Student Percentage (ISP), SFAs and schools divide the number of identified students by the number of enrolled students, and then multiply by 100.

CEP MANAGER

POPULATION   ELECTIONS

Group:	9	29	31.03	Approved	Reopen
Population Testing Group	Total Identified	Total Enrolled	District ISP	Population Status	Election Status

2017   2018   2019   2020   **2021**

Elections

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	--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes | Yes	✓ Approved	Participating	⊘ ✓ »
	5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No | --	⊘ Rejected	Not Participating	⊘ ✓ »
	9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No | No	✓ Approved	Not Participating	⊘ ✓ »

1 - 3 of 3   Previous   **1**   Next

Reopen Submission

The Calculated ISP is used to determine the Federal reimbursement. The ISP multiplied by the CEP multiplier (currently 1.6) provides the Calculated ISP which is the percentage of meals claimed at the free rate.

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CEP MANAGER

POPULATION   ELECTIONS

Group:					
Population Testing Group	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017   2018   2019   2020   **2021**

Elections

	School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist. | New	Approval Status	Actions	
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■	5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No | --	⊘ Rejected	Not Participating	⊘ ✓ »
■	9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No | No	✔ Approved	Not Participating	⊘ ✓ »

1 - 3 of 3   Previous **1** Next

Reopen Submission

An SFA may participate in CEP for all schools in the SFA, or elect CEP in only a certain group of schools, depending on eligibility and financial considerations.
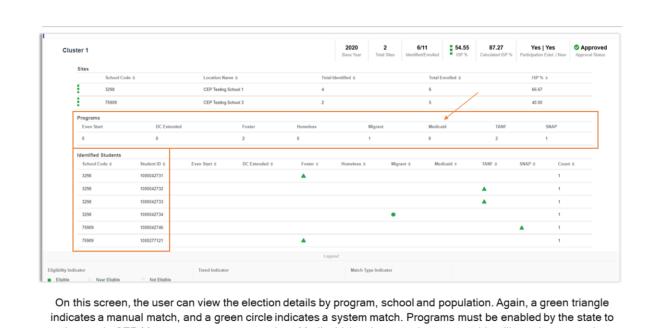
An SFA may participate in CEP for all schools in the SFA, or elect CEP in only a certain group of schools, depending on eligibility and financial considerations.

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CEP MANAGER

POPULATION ELECTIONS

Group:				
Population Testing Group ⌄	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017   2018   2019   2020   **2021**

Elections

Click Here

	School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist. | New	Approval Status	Actions	
⋮	--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes | Yes	✅ Approved	Participating	⊘ ✓ »
▪	5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No | --	🚫 Rejected	Not Participating	⊘ ✓ »
▪	9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No | No	✅ Approved	Not Participating	⊘ ✓ »

1 - 3 of 3   Previous **1** Next

Reopen Submission

Grouping or clustering is a flexible characteristic of CEP that may be used to maximize Federal reimbursements and administrative efficiencies. SFAs have discretion in how to cluster schools to optimize CEP benefits. Clustering (or multiple schools participating as a single CEP group) could allow some schools with an ISP below 40 percent to participate as long as the group ISP is at least 40 percent. Click the double arrow to drill in to see the data details.
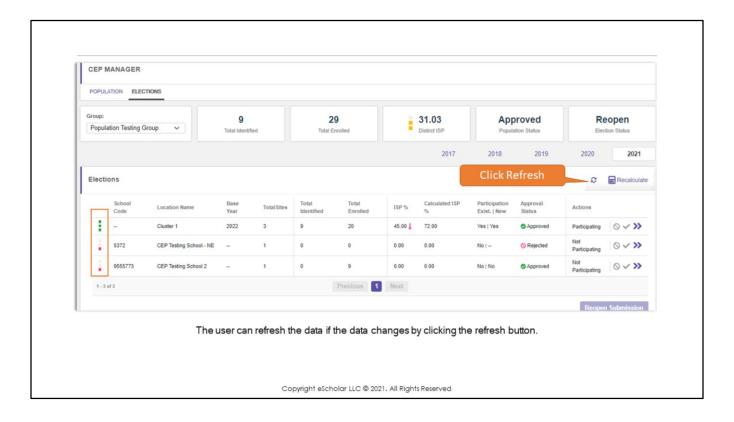
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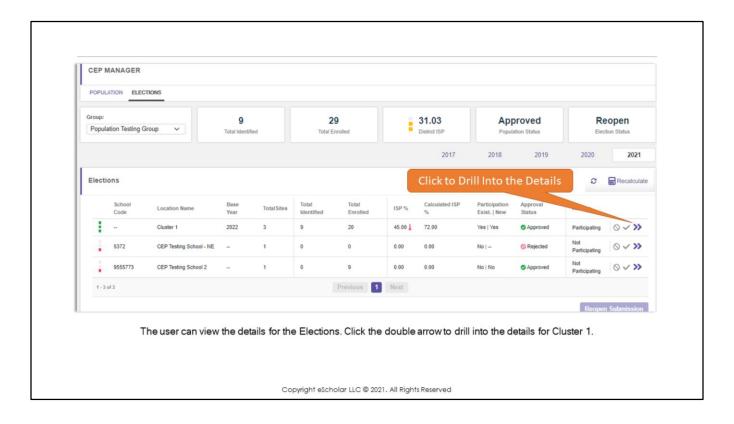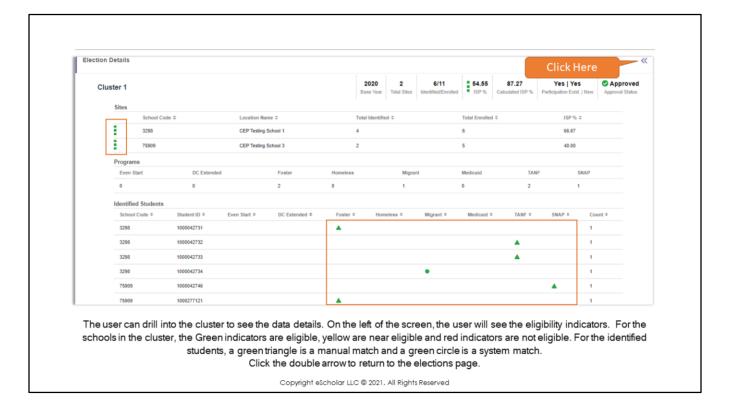Click the double arrow to drill in to see the data details.

On this screen, the user can view the election details by program, school and population. Again, a green triangle indicates a manual match, and a green circle indicates a system match. Programs must be enabled by the state to show up in CEP Manager so a program such as Medicaid that the state does not enable will not show up at the district or building level on this page.

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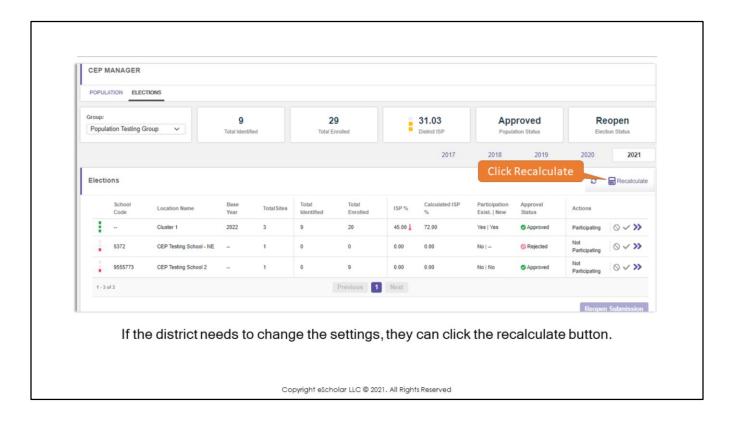
CEP MANAGER

POPULATION   ELECTIONS

Group: Population Testing Group ⌄	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017   2018   2019   2020   **2021**

Elections

Click Refresh ⟶   ⟳   ▦ Recalculate

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1 - 3 of 3   Previous **1** Next

Reopen Submission

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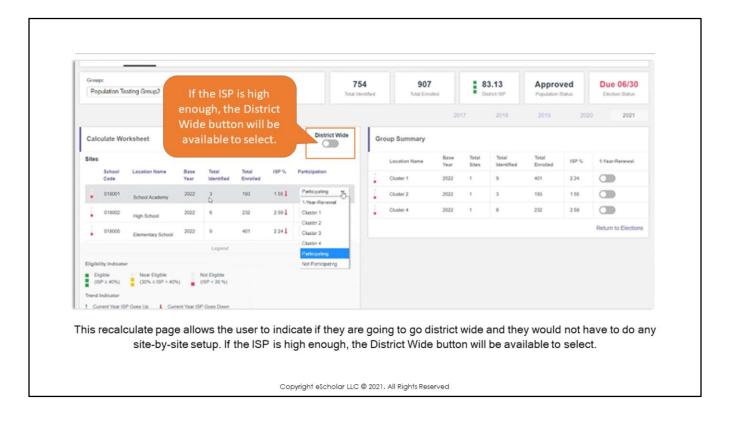
The user can view the details for the Elections. Click the double arrow to drill into the details for Cluster 1.

Election Details

| Cluster 1 | | | | 2020 Base Year | 2 Total Sites | 6/11 Identified/Enrolled | 54.55 ISP % | 87.27 Calculated ISP % | Yes \| Yes Participation Exist. \| New | ✓ Approved Approval Status |

Sites

School Code ⇕	Location Name ⇕	Total Identified ⇕	Total Enrolled ⇕	ISP % ⇕
3298	CEP Testing School 1	4	6	66.67
75909	CEP Testing School 3	2	5	40.00

Programs

Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP
0	0	2	0	1	0	2	1

Identified Students

School Code ⇕	Student ID ⇕	Even Start ⇕	DC Extended ⇕	Foster ⇕	Homeless ⇕	Migrant ⇕	Medicaid ⇕	TANF ⇕	SNAP ⇕	Count ⇕
3298	1000042731			▲						1
3298	1000042732							▲		1
3298	1000042733							▲		1
3298	1000042734					●				1
75909	1000042746								▲	1
75909	1000277121			▲						1

Click Here

The user can drill into the cluster to see the data details. On the left of the screen, the user will see the eligibility indicators. For the schools in the cluster, the Green indicators are eligible, yellow are near eligible and red indicators are not eligible. For the identified students, a green triangle is a manual match and a green circle is a system match.
Click the double arrow to return to the elections page.

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CEP MANAGER

POPULATION   ELECTIONS

Group:				
Population Testing Group ▾	**9** Total Identified	**29** Total Enrolled	**31.03** District ISP	**Approved** Population Status	**Reopen** Election Status

2017   2018   2019   2020   **2021**

Click Recalculate

Elections   ↻   ▦ Recalculate

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1 - 3 of 3   Previous   **1**   Next

Reopen Submission

If the district needs to change the settings, they can click the recalculate button.

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This recalculate page allows the user to indicate if they are going to go district wide and they would not have to do any site-by-site setup.
If the ISP is high enough, the District Wide button will be available to select.

The district can also set up the site-by-site participation and the clusters can be assigned on this page. Participating and Not Participating choices only apply to schools operating CEP by themselves.

The clusters can be assigned on this page. When choosing clusters, choose Cluster 1 first, followed by Cluster 2, 3 and 4 sequentially. Do not skip a cluster number in the sequence.

Poll #6

Select the best answer on your screen.

Let's take a look at a poll in the webinar. Just click on the best answer on your screen.

Poll #6

Who can view the CEP Manager data?

Answers:

- All users regardless of role.
- Only those with rights to CEP Manager.
- Only system administrators.
- All of the above.

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System Features and Wrap Up

Student Search

Student Search

✓ Click Student Search or the magnifying glass on the navigation panel.

Click Student Search or the magnifying glass on the navigation panel.

Type in the student's Secure ID, select the match type, in this case TANF and click Search.

The system returned the student along with her eligibility types.

"My Students" from Version 11 has been replaced with a simple student search feature. To download all students in a program, regardless of batch, choose Search, do not enter a State ID number, select the Match Type, the district is selected based on your user role, select the Year and click Search.

The list of all students in the program will be displayed. Click the download icon in the upper right of the search results panel.

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State Batches

State Batches

District Batches vs. State Batches
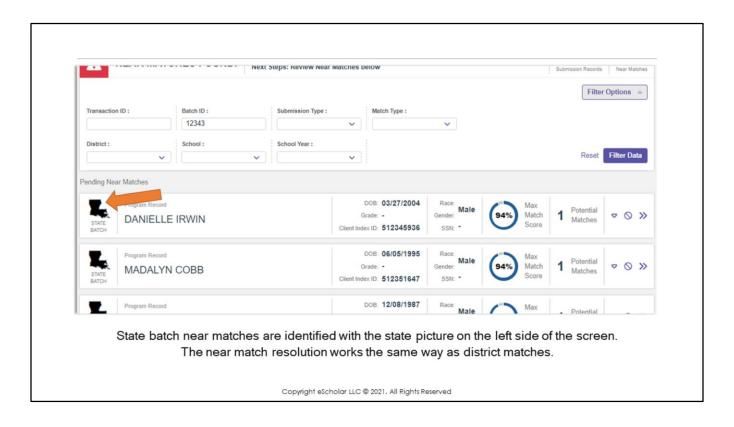
District Batches:
District batches match the district student records against the state program records such as SNAP, TANF, etc. The district batches contain a smaller record count than the state program record files such as SNAP or TANF.
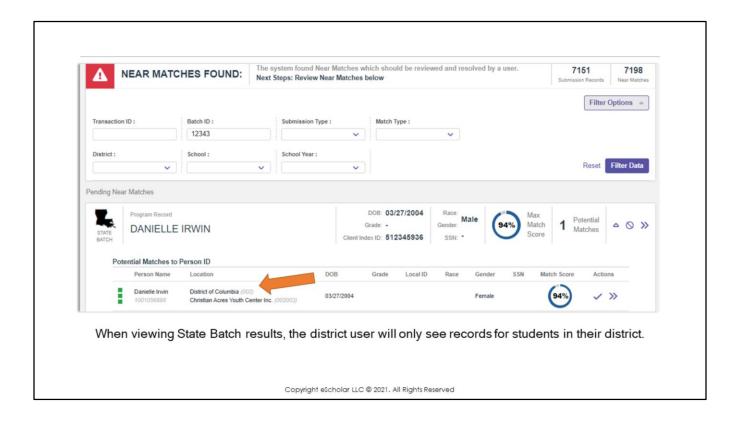
State Batches:
In a State Batch, the Match Type or Program data file such as SNAP or TANF contains a much smaller record count when compared to the State Batch file which contains all Person ID records for the entire state. In other words, the Match Type or Program file such as SNAP contains a subset of the State Batch records. The system will process the records much faster when comparing the smaller file against the larger record file. The results of the State Batch will contain all TANF (or Program) records and the match, near match or no match records from the Person ID records for the entire state.

Completed - 5 Most Recent

Batch Info	Match Type	Location Info
12581 THEV3FILE_NEW.txt File	SNAP	**District of Columbia** (002) *Christian Acres Youth Center Inc. (002003)*
12576 THEV3FILE_NEW.txt File	SNAP	**District of Columbia** (002) *Christian Acres Youth Center Inc. (002003)*
12573 THEV3FILE_NEW.txt File	Foster	**District of Columbia** (002) *Christian Acres Youth Center Inc. (002003)*
12559 DM Person ID (State)	TANF	**State Batch**
12503 DM Person ID (State)	Foster	**State Batch**

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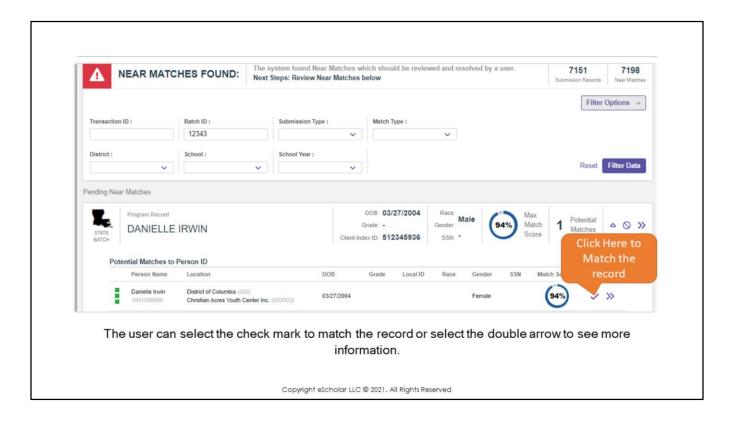
State Batches are identified with the term State Batch in the Location Info field.

State batch near matches are identified with the state picture on the left side of the screen.
The near match resolution works the same way as district matches.
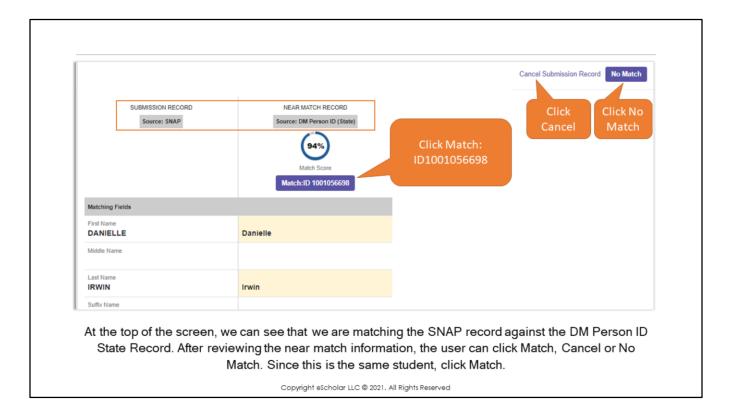
State batch near matches are identified with the state picture on the left side of the screen.
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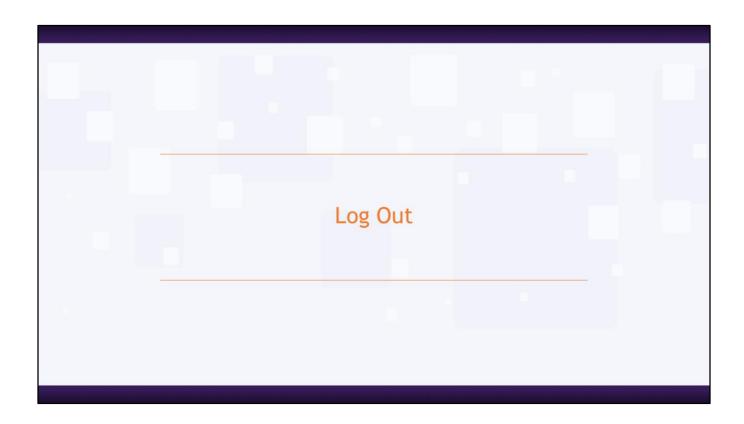When viewing State Batch results, the district user will only see records for students in their district.

The user can select the check mark to match the record or select the double arrow to see more information.

Click the double arrow to see more information.

At the top of the screen, we can see that we are matching the SNAP record against the DM Person ID State Record. After reviewing the near match information, the user can click Match, Cancel or No Match. Since this is the same student, click Match.
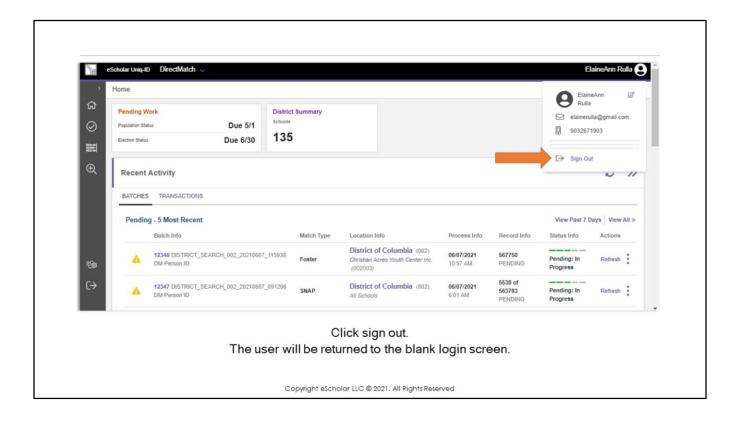
Log Out

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The user should always log out of the system when not actively using it. Do not ask the browser to save your username and password. There are two ways to log out. The first method is at the bottom of the navigation screen.

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The second method is located under the username in the upper right corner.
Either way will work just fine.

Click sign out.
The user will be returned to the blank login screen.

Review

Today we discussed:

✓The matching logic used in the DirectMatch System

✓How to make a good match decision

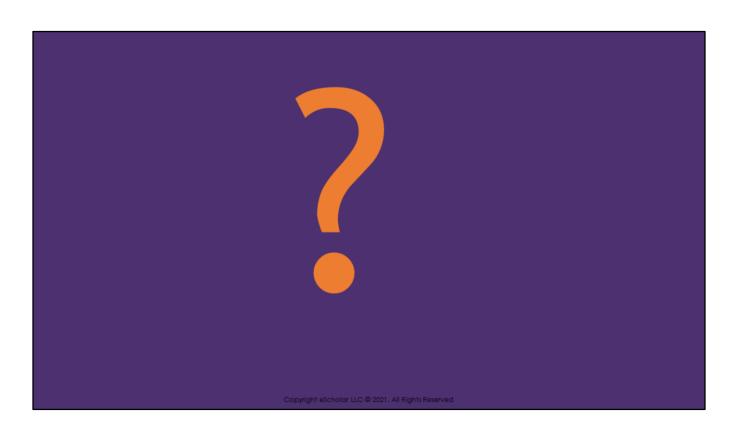✓The process for downloading Match Records

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✓The matching logic used in the DirectMatch System

✓How to make a good match decision

✓The process for downloading Match Records

Contact eScholar Support at

support@escholar.com

To access the Louisiana DirectMatch system, check your email for an invitation from eScholar to create your account. Be sure to check your Junk mail or Clutter. If you still have issues with access to the system, contact support at support@escholar.com.

Any Questions

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Thank you for your time.